

**Montana Department of Commerce**

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**2001 Internet Conversion  
Research Report**

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**Prepared January 2002**

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## BACKGROUND & OBJECTIVES

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Consumers' increasing use of the Internet as a source of travel information has instigated indisputable and unprecedented change in the tourism industry. National research reveals that almost half the households in the U.S. have Internet access. Moreover, among households that travel on a regular basis, this number is closer to 80%. In addition, people are booking airline and hotel reservations on the Net, using this tool to research city/state destinations and attractions. As Internet usage grows, many destinations are noting a reduction in requests for brochures and print material. Montana, on the forefront of this trend, developed a cutting-edge Web site. Travel Montana has focused much of its promotional effort on directing people to its Web site and using it as a pivotal marketing tool.

Today, tourism organizations need to attend to the development of effective Web sites by assessing those who use the Internet and its impact on converting visitors. Therefore, the conversion assessment needs to focus on identifying specific visitation that results from usage of the Travel Montana Web site. Such research can identify relationships between the Internet and travel behavior, visitor characteristics, Internet usage behavior, and fulfillment effectiveness, as well as economic impact on the State.

### **The informational objectives for this study follow:**

- ▶ **Measure overall impact of the visitmt.com Web site** with regard to visitor conversion and economic impact upon the State;
- ▶ **Assess the visitmt.com Web site for creating interest** in Montana and stimulating visitation;
- ▶ **Compare Web site users** to those who actually visit the State to guide future targeting efforts;
- ▶ **Explore the travel decision process** in terms of timing and use of traditional literature and the Web site to obtain information;
- ▶ **Gauge impact of the visitmt.com Web site by linking intent to visit with actual visitation** among those who visited the site;
- ▶ **Obtain information relative to overall Internet usage and for travel planning**, reasons for accessing the site, past access, sources of information about the site, etc.; and
- ▶ **Provide conclusions & recommendations** relative to the effectiveness of Montana's Web site in converting travelers to the State.

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## METHODOLOGY

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The goal of this research was to measure the effectiveness of the [visitmt.com](http://visitmt.com) Web site in generating visitation to Montana. Traditionally, measuring Internet conversion has been difficult. From a lead perspective, the only site visitors that can be included are those who request material or literature. As such, a large population, those who go to a site but do not request information, is often excluded from the equation. In many cases, these individuals may print information directly from the site. Yet this group is likely to be comprised of visitors, as well, and needs to be included in any conversion measure. Without a methodology that fully captures a representative sample of Web site visitors, profiling them can be quite difficult.

Additionally, as Internet usage evolves, the role of fulfillment material is questionable. Are more people using the Internet as a way to gather information in lieu of calling for travel guides, etc., are they using both methods or is their behavior consistent with the past before the advent of the Internet? Answers to these questions are increasingly important as Internet technology advances and budgetary concerns arise. To answer these questions, SMARI developed a methodology that employs a two-part process for Internet conversion studies. The first step is the Travel Intentions Baseline Study, which is then succeeded by the Conversion Measurement Study.

The Travel Intentions Baseline Study uses the time at which the Montana [visitmt.com](http://visitmt.com) Web site is accessed to collect names and e-mail addresses and ask a few questions relative to travel behavior before the full Conversion Research Study is begun. A link was created with the Web site that randomly surveyed visitors to the site. These Web site visitors could opt out of the survey at any time and be returned to the [visitmt.com](http://visitmt.com) Web site.

This link was maintained on the [visitmt.com](http://visitmt.com) site from April through August 2001. The goal was to gather from 2500 to 3000 names during this phase. Over 4000 people accessed the survey and 2,834 surveys were completed and approximately 1000 surveys were incomplete. In similar research conducted by SMARI, it has been typical for 65% to 75% of respondents to provide a correct e-mail address. For this program, the 2,834 names yielded 2,120 valid names and e-mail addresses or 74% of the original list. This was the sample used for the Conversion Study.

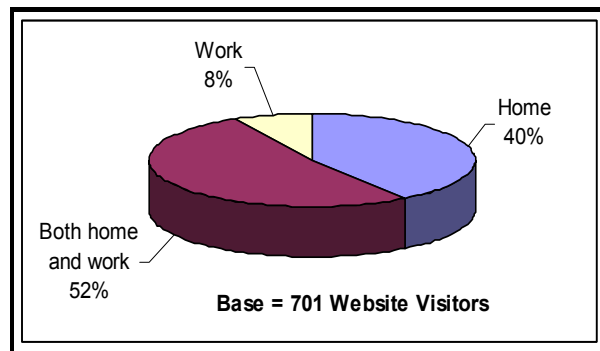
On November 19, SMARI e-mailed these 2,120 [visitmt.com](http://visitmt.com) visitors an invitation to visit our Web site to complete the conversion follow-up survey. In appreciation for completing this survey, each respondent's name was placed in a drawing to win either \$250 or a framed poster by renowned Montana artist, Monte Dolack. Subsequently, two reminder e-mails were sent to non-responders again asking for their participation. On December 10, 2001, the survey process ended. At that time, 701 surveys had been completed, a completion rate of 33% that were e-mailed an invitation to participate. Typically response rates are between 30% and 35%. These responses were processed and analyzed. Various statistical procedures were used, as appropriate. The following report summarizes the key findings from this research project.

## MONTANA TRAVEL WEB SITE

### Internet Usage

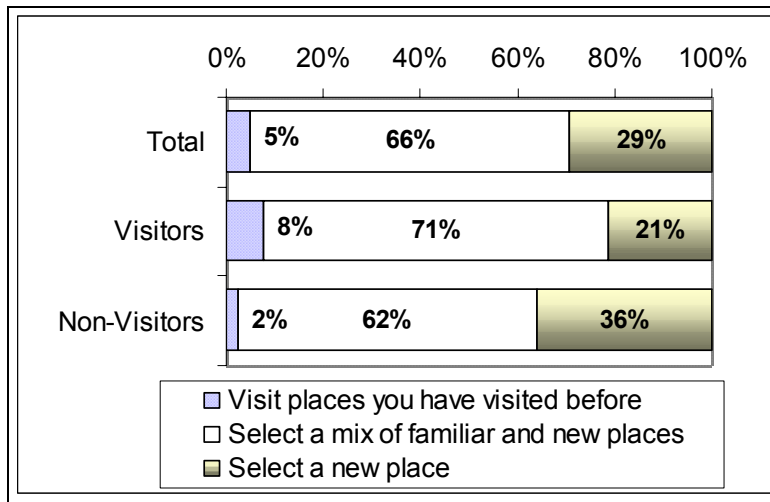
A good place to begin reviewing the research results is with the overall Internet usage of these respondents. Knowing how these consumers generally use travel Web sites provides a context for evaluating usage of the [visitmt.com](http://visitmt.com) site. Since these respondents were people who had visited the [visitmt.com](http://visitmt.com) Web site, all of them have Internet access. Interestingly, however, over half of them have access at home *and* at work. Almost all (92%) have Internet access at home, while 60% have Internet access in the workplace. Clearly, this population is “well-connected,” suggestive of sophisticated Web users.

### Internet Access



Of interest is how this group uses the Web to gather travel information. While this topic could not be completely explored, a few questions were addressed. The first involved an exploration of whether people look for new vacation destinations or tend to choose familiar places. When respondents were asked if they choose new vacation spots or return to familiar places, about two-thirds claimed to select a mixture of new and familiar places. While 5% indicated generally preferring tried-and-true places, a much larger group, 29%, indicated mostly selecting new and unfamiliar destinations. Those who had not visited Montana were *more likely* to select new destinations than were those who had visited the State. This suggests that many people are searching for new travel options and they use the Web in that search. As such, the Web site may be a first point of contact for consumers who have never visited the State. Their impressions of Montana, as made on the site, will significantly impact their decision to continue exploring Montana as an option or to seek out other destinations.

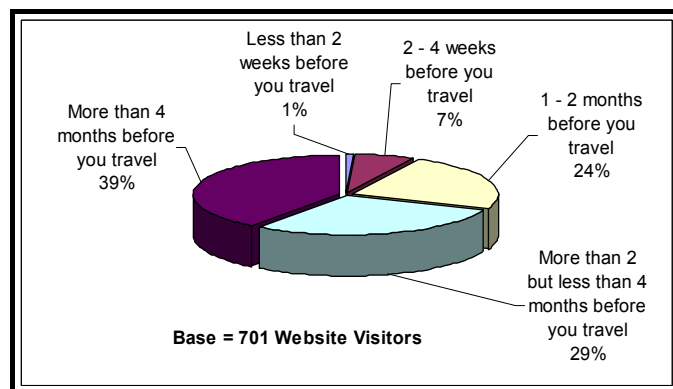
### Selection of a Vacation Site



How far in advance of taking a trip do people visit a Web site for information? Do they use the site to make initial plans or do they visit the site just prior to departing to get specific information? Generally, Web site searches are done well ahead of the actual trip. The majority begin their Web site search for information at least two months before their planned trip, with 39% starting their informational searches more than four months in advance. An additional 29% usually start searching for travel information two to four months in advance of their trip.

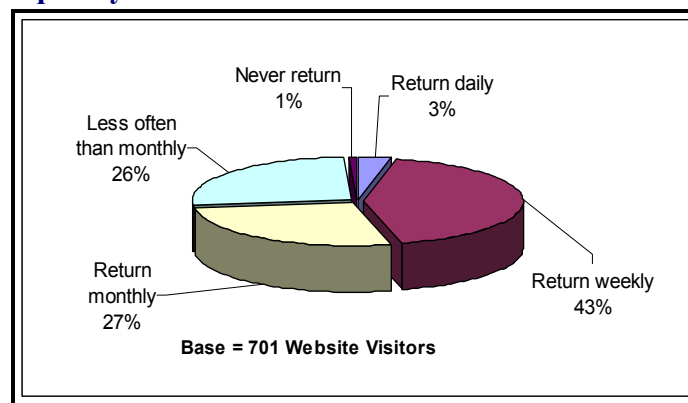
Undoubtedly, the Web site is not merely a last minute resource for specific information about a chosen destination. Travel sites are hit early in travel planning – perhaps to choose a destination, but certainly to obtain all sorts of information about a destination. Only 8% access the Web site to start planning within a month of their trip. People could also be hitting a site multiple times and could access it just prior to a trip, but they are also visiting the site well ahead of departure time.

### Start of Internet Search for Travel Information



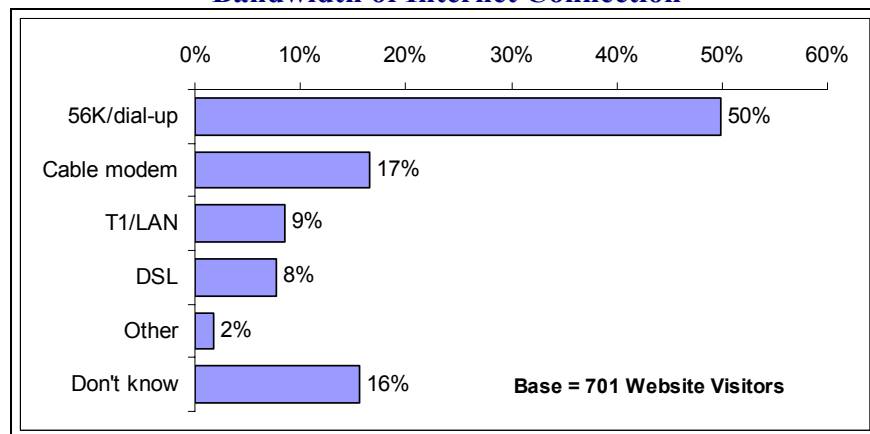
When asked how often they return to a particular Web site for travel information, the most frequently selected timeframe was “on a weekly basis.” Over four in ten respondents (43%) indicated checking a particular travel Web site weekly and an additional 27% do monthly hits on a travel site. Consumers are using specific Web sites throughout the travel planning process, suggesting that they probably use the site for multiple reasons. They continue to gather information as they plan their trip and most likely use the site to first gather general information and then later to obtain more detailed facts. Consequently, Web site content needs to be frequently updated and “freshened” to accommodate repeat usage.

#### Frequency of Return to Same Internet Travel Web Site



Knowing how Web site visitors connect to the Internet can dictate what the Web site can contain and how it is designed. Fully one-half the respondents indicated they connected to the Internet via a dial-up or 56K modem. Additionally, there is a good probability that most or all of the 16% who “didn’t know” their Internet connection are probably at this speed as well. If a Web site is too difficult to navigate or takes too long to pull pages up, people will get frustrated, quit the site and not return.

#### Bandwidth of Internet Connection



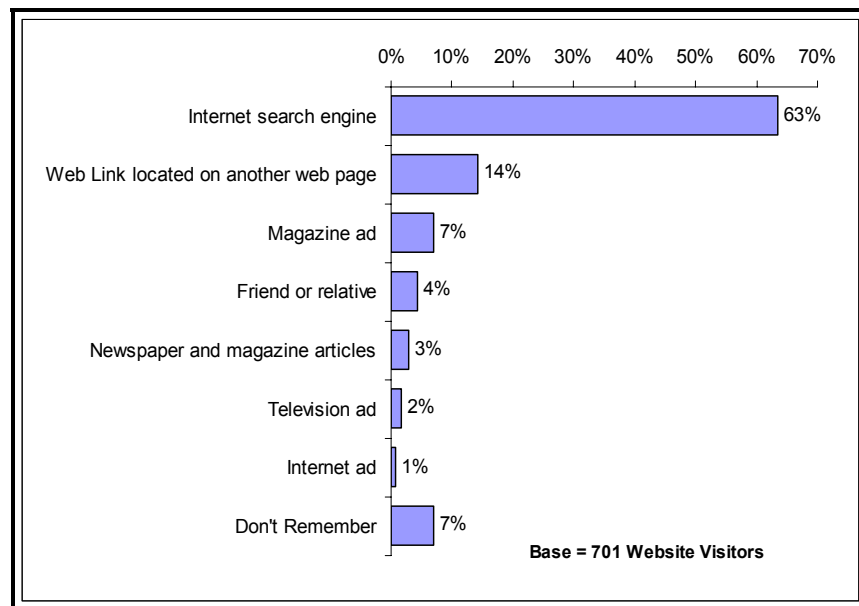
## The Travel Montana Site

The initial profile of [visitmt.com](http://visitmt.com) users suggests that they are active and probably sophisticated Web site users and travelers. They start searching the Web early in the travel planning stage and revisit the same site regularly during the process. As such, the manner in which they use the Montana site and the level at which it meets their expectations is of significant importance.

First, how did these [visitmt.com](http://visitmt.com) visitors learn about the site? As with other destination research conducted by SMARI, the vast majority (63%) indicated discovering the [visitmt.com](http://visitmt.com) Web site through an Internet search engine. The next most frequent source (14%) was through a link from another Web site. Advertising is listed much less frequently than search engines and Web links. Among the advertising categories, magazine ads (7%) were mentioned most frequently.

While advertising in magazines, television, and on the Internet seem to be mentioned somewhat infrequently, SMARI's research finds this integral to Internet dynamics. People tend to say that seeing a Web site address in ads often just tells them that a Web site exists. When they begin gathering information, they are aware of its existence and use a search engine to locate the site. It is fair to say that advertising is presumably creating some level of awareness of the site, thus promoting its usage.

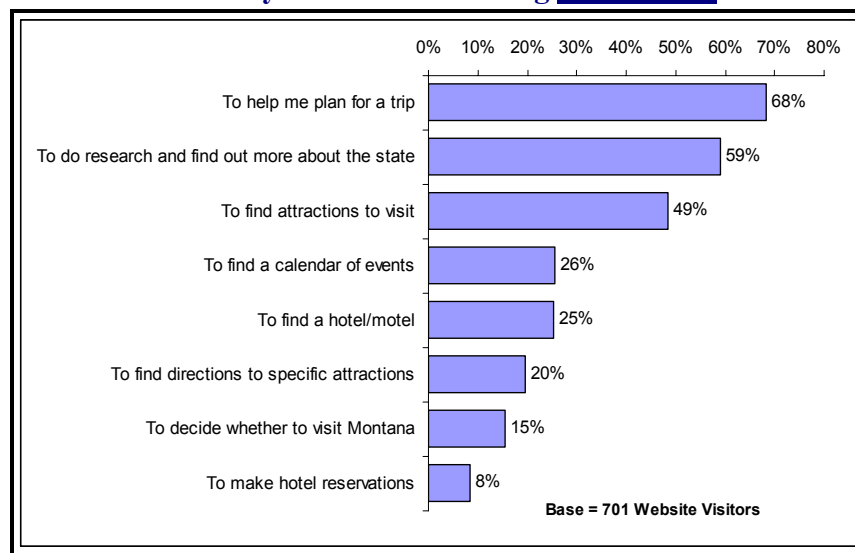
**Source of Awareness of Web Site**



*Totals more than 100% because some respondents selected more than one source.*

In addition to knowing how people gain awareness of the site, it is essential to know why they visit it. The most frequently mentioned reasons for visiting the [visitmt.com](http://visitmt.com) Web site were to assist in planning a trip to Montana, to research information about the State, and to identify attractions of interest. While the majority uses the site to plan a trip, suggesting they have already chosen a destination, many are researching the State. For this group, the Web site can serve as a way to “sell” Montana and promote its unique distinctions. Many people also want specific information about attractions, events (a calendar of), and hotel/motels. The site needs to effectively market the State *and* provide comprehensive information to those planning a trip. Given what we know about travel Web site usage, people will likely visit the site several times and they have different informational needs throughout the decision and planning process. The site needs to be designed for easy and convenient access to all the information people need to plan their visit to Montana.

#### Primary Reason for Visiting [visitmt.com](http://visitmt.com)



*Totals more than 100% because respondents could select more than one reason.*

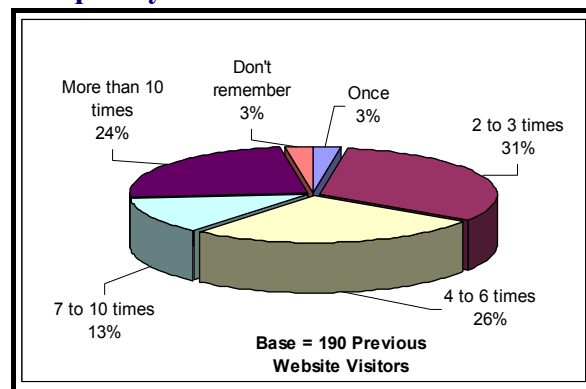
Interestingly, differences are noted between actual Montana visitors and those who only visited the Web site. The most often mentioned reason for visiting the site among visitors was to help them plan their trip, while the most often mentioned reason among *non-visitors* was to research the State. Seemingly, visitors had already made up their minds to visit the State and were exploring things to do and see while in Montana.

On the other hand, non-visitors were more likely to be doing research and trying to decide where they might like to visit. Montana was only one of their vacation possibilities and their decision had not yet been made. Given these findings, the site should be reviewed in terms of how it sells the State.

Purpose	Visitors	Non-Visitors
Help me plan for a trip	78.3%	59.2%
Do research & find out more about State	56.3%	61.6%
Find attractions to visit	55.1%	42.5%
Find a hotel/motel	34.8%	19.2%
Find a calendar of events	32.4%	16.4%
Find directions to specific attractions	26.5%	13.4%
Make hotel reservations	14.0%	3.3%
Decide whether to visit Montana	9.8%	20.5%

While people reported repeat visitation to a single travel site, 27% of the Web site visitors had visited the [visitmt.com](http://visitmt.com) Web site previously. At the same time, of these previous viewers, 37% could be considered “regulars,” having visited the Web site more than six times over the past year. Most were new visitors to the site, but the repeat users represent a significant percent of visits to the site.

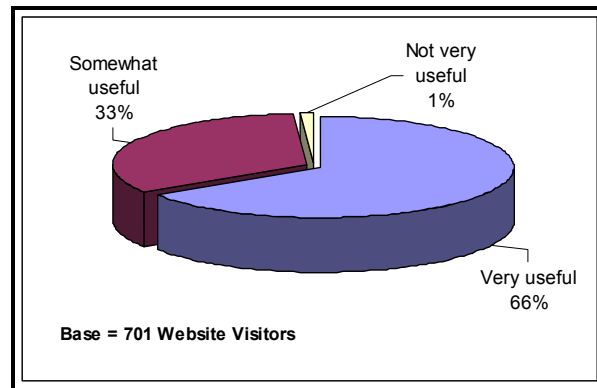
#### Frequency of Web Site Visits in Past Year



#### Web Site Information

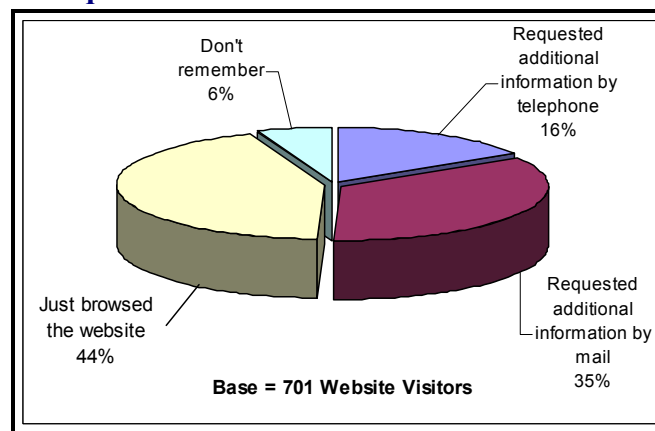
The [visitmt.com](http://visitmt.com) Web site provides thorough and useful information, as stated by 93% of the Web site visitors (indicating the ability to locate all or most information they needed on the site). Furthermore, nearly two-thirds of the site visitors considered its content “very useful” and another one-third rated it “somewhat useful.” These findings are quite positive, indicating that the site is meeting users’ expectations. While ratings of other destination sites are not available, these high ratings imply that Montana’s site is, in all probability, quite competitive.

### Usefulness of Web Site Information



Given the high level of usage of the Montana Web site and its elevated ratings, it might seem that the site is meeting all consumers' information needs. However, while the overwhelming majority considered the Web site information useful, about half requested additional travel information via mail or telephone. The other half merely browsed the site or did not recall whether they requested additional information.

### Requested Additional Montana Information



Of those who requested additional information, 95% indicated receiving the follow-up information requested.

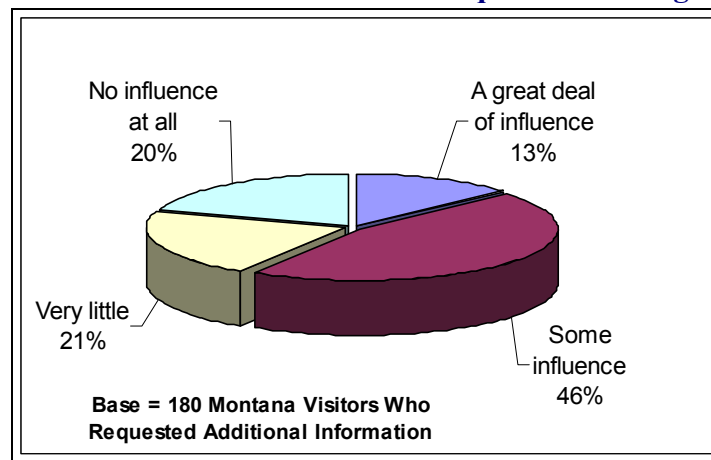
Given that people appear to be overwhelmingly pleased with the site, it is not necessary to enhance it at this time. However, the research indicates that people want additional information - probably printed material. Other research conducted by SMARI indicates that people often want something they can hold in their hands and take with them - something other than material printed off their home printer. They want professional looking, color brochures and information that can be shared with family and other travel party members. Even Montana Web site users want different types of information and are often unwilling to depend entirely on the Web.

## Additional Travel Information

As indicated, about half the Web site visitors requested additional travel information via phone or mail. The mere act of requesting this information does not definitely indicate a commitment to travel to Montana. About one-half the people who requested additional travel information from Montana actually traveled to Montana. Rather, people often want a variety of information sources as they go through their travel decision process. Travel Montana should have an integrated strategy for providing consumer information. This strategy should create synergies between the Web and printed material in a way that generates visitation and convinces consumers to choose Montana as their travel destination.

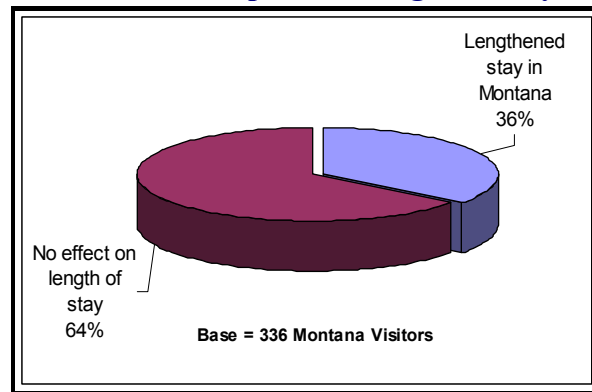
Among Montana visitors who requested additional information, 91% indicated they had already decided to visit Montana before receiving the requested material. However, nearly 60% of those who requested additional information indicated being *positively influenced* by it.

### Influence of Additional Information Requested Among Visitors



Just over one-third of the Montana visitors (36%) indicated that the Web site travel information and any additional information they received actually influenced them to *extend their stay* in Montana. The remainder claimed that the information did not influence their plans. In addition to helping promote visitation, the materials should also provide information that gives people reason to stay longer and visit more attractions and different parts of the State.

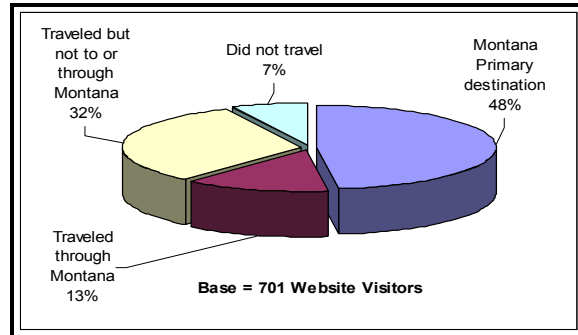
### Material's Impact on Length of Stay



## CONVERSION OVERVIEW

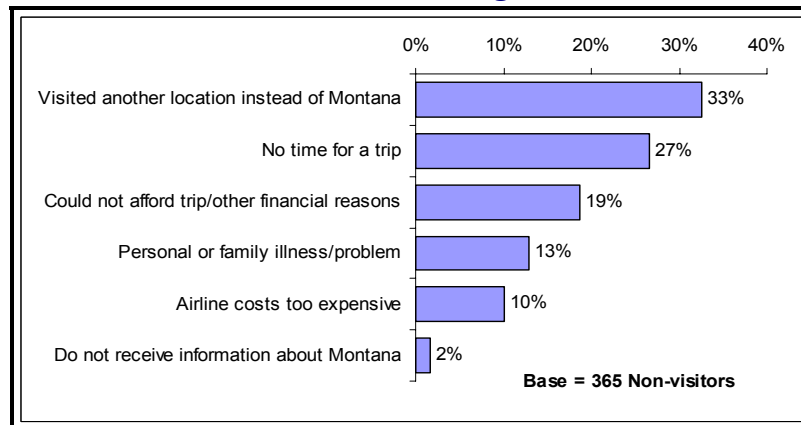
The Conversion Study is designed to assess the impact of a campaign or medium on visitation. The level of visitation is translated into economic impact and, ultimately, the return on marketing dollar investment. While the Web site must provide motivating, appealing, and valuable information to consumers, the ultimate objective is to “convert” those interested in the State into visitors. Among the [visitmt.com](http://visitmt.com) Web site users, 61% did travel to or through Montana in the past year. In fact, nearly half indicated that Montana was their *primary* travel destination. About one-third of the site visitors made travel plans that did not include going to/through Montana this year. The remaining 7% did not travel.

### Travel Destinations



While the level of visitation was quite high, a significant number of Web site users, did not visit Montana. The largest single reason for non-visitation was visiting another destination. For many, however, lack of time or money precluded travel. The only negative element directly linked to Montana was airline costs, which seemed a pivotal barrier among non-visitors.

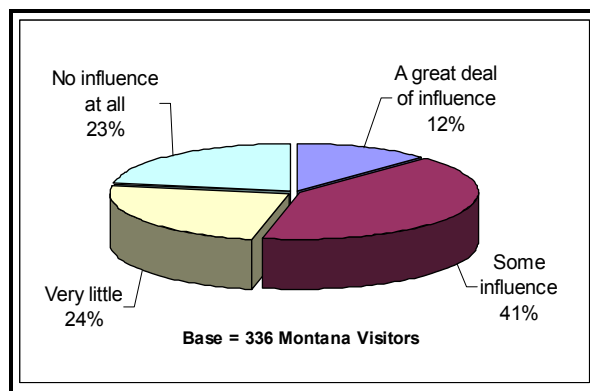
### Reasons for Not Traveling to Montana



Totals more than 100% because some respondents selected more than one reason.

Of those who did travel to Montana as their primary destination, about 90% indicated deciding to travel to Montana before they visited the State's Web site. However, about 25% of those were considering a trip "sometime in the future." This is a typical scenario, given that people are hesitant to admit being influenced by anything other than their own motivation. At the same time, while most stated they had already decided to travel to Montana, 53% indicated that the Web site did have a positive influence on their selection of Montana as a destination. This highlights the important role of the Web site in "converting" interested consumers.

#### Web Site's Influence on Travel Decision



## DEMOGRAPHIC PROFILE

What kinds of people visit Montana? Do demographic characteristics differ between visitors and non-visitors? Assessing these differences can assist in guiding marketing efforts and provide a lucid description of the target audience.

Comparing the demographics of visitors to non-visitors, it is clear that visitors are slightly better educated and earn higher household incomes. Visitors are also slightly younger. The two groups vary little relative to marital status and the average number of people and children in the household. Compared to the population, in general, Web site users are more likely to be married, better educated, and to earn higher incomes.

The profile of Web users overall and Montana visitors is predictable, reinforcing general knowledge that Internet users and travelers are somewhat better educated and earn higher incomes than consumers in general.

**Web Site Visitor Demographics vs. National Averages**

	2001		
	Montana Visitors	Non- visitors	National Average
<b>Marital Status</b>			
Married	72.9%	71.8%	59.7%
Divorced	7.7%	12.1%	12.6%
Widowed	1.8%	.3%	7.1%
Single/Never married	14.3%	14.2%	20.1%
<b>Education</b>			
High school or less	8.0%	6.8%	49.7%
Some College/Tech. school	32.4%	39.5%	23.6%
College graduate	39.9%	35.6%	19.2%
Post graduate degree	17.9%	14.8%	7.5%
<b>Avg. # People in HH</b>	2.7	2.7	2.6
<b>Avg. # Children in HH</b>	.6	.6	.6
<b>Avg. Age</b>	45.5 yrs	46.3 yrs.	N/A
<b>Avg. Income</b>	\$75,536	\$64,654	\$57,045

*May not add to 100% because some people declined to answer.*

## TRIP SPECIFICS

Vital to conversion research is the issue of visitors' leisure activities. For what primary reason did people visit Montana? How did they travel to the State? Where did they stay and for how long did they stay? Answers to these questions and issues surrounding travel party size, visitor profiling, and visitor expenditures determine the success of the advertising campaign and provide valuable information for focusing Web site content and developing other methods for effectively promoting Montana.

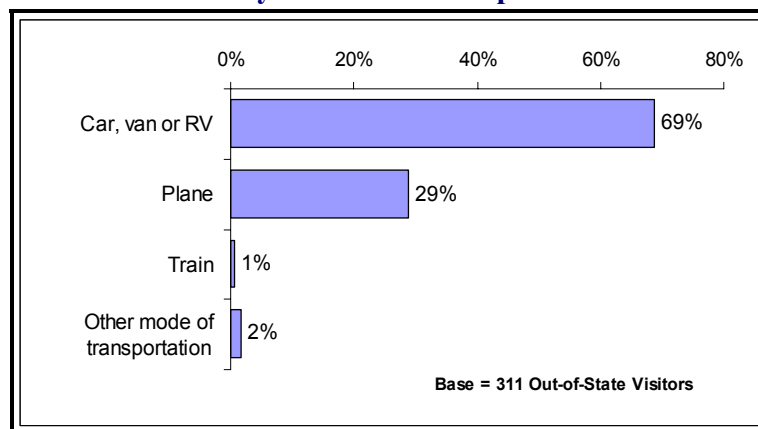
### Primary Means of Transportation

Perhaps as expected, the vast majority of visitors traveled to or through Montana in a car, van, or RV. Of note, 29% of visitors traveled to the State by air – a percentage somewhat higher than that noted for other destinations. This makes airfares to Montana much more important relative to incentives or barriers to travel. It might make sense to highlight airfare deals or packages on the Web site or to provide information about finding the lowest fares.

As might be expected, these air travelers spent slightly more time in the State (average of 8.1 nights vs. 7.1 overall). While they spent about the same amount of money per day as average Montana travelers (\$310 vs. \$305), due to their longer trips, they are somewhat more valuable to the State.

Other means of transportation included train, bus, motorcycle, bicycle (one respondent traveled with a group of about 1500 cyclists, and one respondent mentioned traveling by mule).

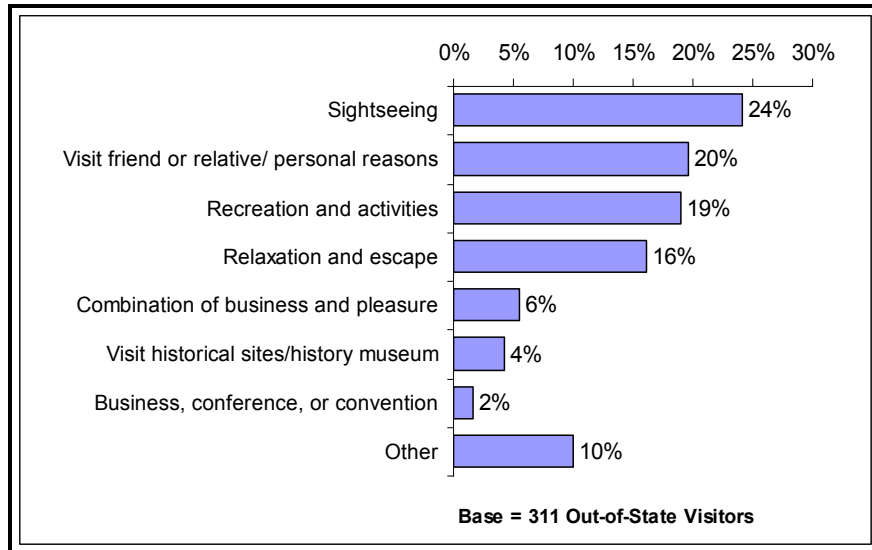
### Primary Means of Transportation



## Primary Purpose of Trip

Sightseeing, recreational activities, and relaxation were among the most often mentioned reasons for respondents' most recent trips to Montana. These reasons, along with visiting friends or relatives, account for nearly eight in ten visitors' primary reasons for visiting. Of note, the two key reasons given for visiting the State - sightseeing and relaxation - are activities of a more passive nature. The themes that various groups of potential visitors associate with Montana will be explored later in the report. It seems that a primary motivation for visiting Montana is getting away from daily routine and experiencing the beauty of the State. These benefits should be promoted on the Web site as notable rewards for visitation.

### Primary Purpose of Visit to Montana



What is the significance of family travel to the State? The vast majority of visitors to Montana is represented by couples. Two-thirds of visitors indicated two adults in their travel party and 70% of these couples traveled without children. About 30% did travel with children, which is similar to the national average (33%) of households with children in the U.S.

With regard to many states and destinations, it is interesting to consider overnight visitors versus daytrippers. People who travel to Montana are not on “day-trips.” Among out-of-state visitors over the past year, all spent at least one night in Montana, with fully one-half spending at least six nights in the State. The duration of the average trip was 7.1 days.

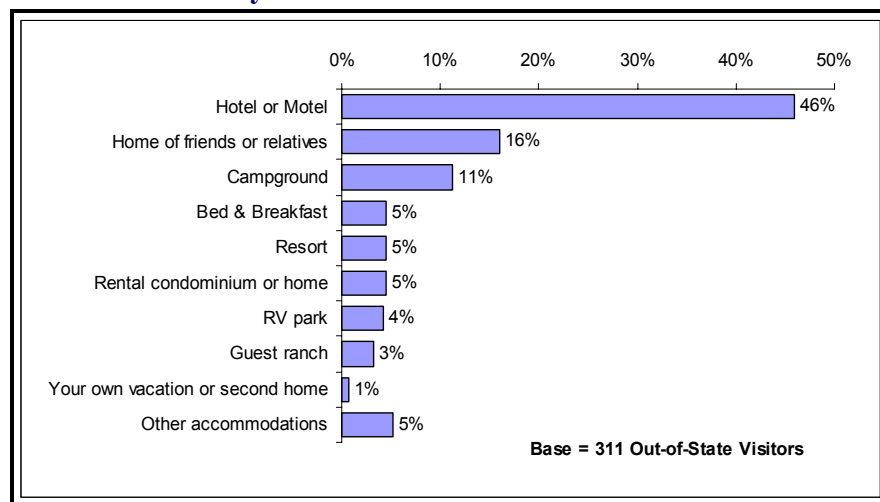
### Overnight Trip Specifics

Duration of Trip	7.1 Nights
Total Number of People on Trip	2.9 People
Number of Children on Trip	.6 Children
% Of Trips with Children	30%

### Primary Accommodations

Among out-of-state visitors, 46% stayed primarily in hotel/motels - mentioned nearly three times more often than the next accommodation type, staying with friends/relatives. Eleven percent of respondents stayed at a campground and an additional 4% at an RV park. Bed & Breakfasts, resorts, and condominiums account for about 15% of the accommodations patronized.

### Primary Accommodations Used in Montana



## Average Daily Expenditures in Montana

A primary objective of this research was to determine the economic benefit of travel to Montana. To gain a better perspective on this information, out-of-state visitors were asked to estimate their average daily expenditures (in Montana) in several categories. Given that the average travel party was comprised of 2.9 people and average daily expenditures were \$305, the average equates to approximately \$105 per/person per/day. Given that the average stay in Montana was about 7 days, the average total expenditure per trip was about \$2,135.

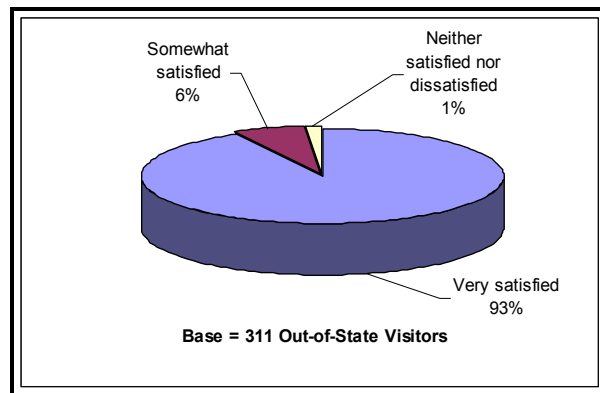
### Overnight Visitors – Average Daily Expenditures

Expenses for...	Average Daily Expenditures
Lodging	\$83.68
Meals/food/groceries	\$63.48
Shopping	\$46.32
Transportation (in Montana only)	\$41.83
Entertainment	\$23.48
Admissions to parks/attractions/etc.	\$13.55
Miscellaneous other things	\$32.66
<b>Total</b>	<b>\$305.00</b>

## Overall Satisfaction with Visit to Montana

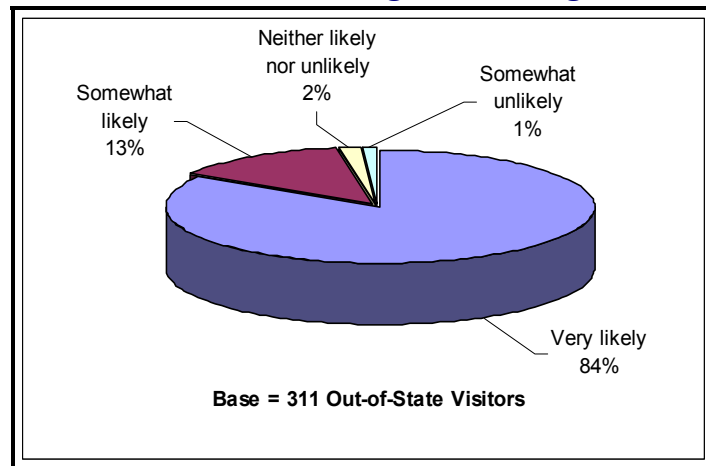
Overall, visitors to Montana were very pleased with the Montana experience. More than nine in ten visitors (93%) indicated being *very satisfied* with the State. None of the visitors registered any dissatisfaction. In fact, the worst rating among respondents was being somewhat indifferent to the experience (being neither satisfied nor dissatisfied).

### Overall Satisfaction with Visit to Montana



When visitors were asked to rate the likelihood of returning to Montana, about five in six visitors (84%) claimed to be “very likely” to return. An additional 13% indicated being “somewhat likely” to visit again.

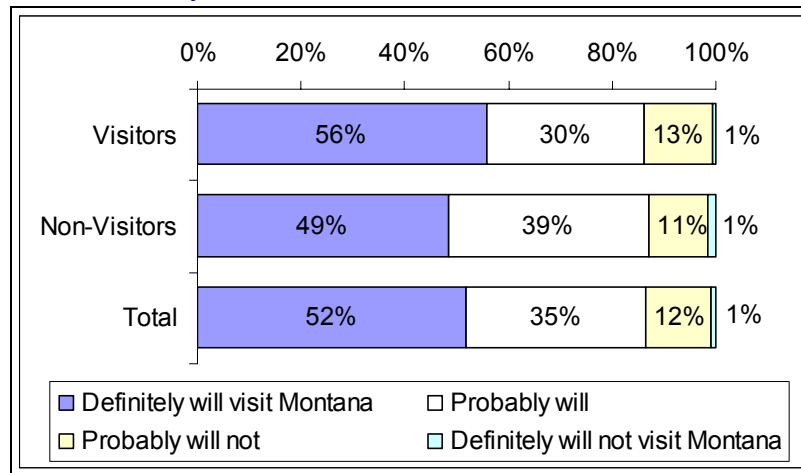
### **Likelihood of Visiting Montana Again**



## FUTURE TRAVEL INTENTIONS

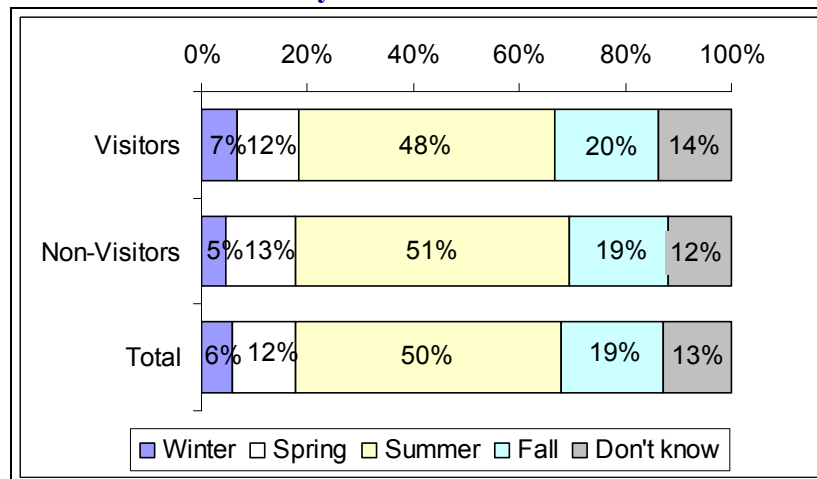
While visitors were quite pleased with their trips to Montana and intend to return, this may not occur any time soon. While slightly less than half the Web site users actually visited Montana as their primary destination, all were asked to rate the likelihood of visiting Montana in the next two years. Visitors were slightly more likely to say they “*definitely will*” visit, while a greater number of non-visitors said they “*probably will*” visit Montana in the next two years. Overall, about seven in eight [visitmt.com](http://visitmt.com) site visitors (87%) indicated they “definitely will” or “probably will” visit Montana during the next two years.

### Likely to Visit Montana in Next Two Years



Summer was the travel season of choice for most Web site visitors. Overall, half the respondents selected summer as the preferred season for visiting Montana. Fall was selected by about 20% of Web site visitors. The winter was least often selected.

### Most Likely Season to Visit Montana



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## ECONOMIC IMPACT

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In traditional conversion research, the goal is to determine how many people traveled and the return on investment measured against the expense of advertising. The preceding information, including the number of actual visitors, the influence of the materials, and visitors' spending patterns are combined to calculate the economic impact of the campaign and its return on investment.

To determine the economic benefit of any marketing effort, the numbers deserve careful consideration. This research indicates that most of the respondents decided to visit Montana *before* they visited the Montana site. While the site may not be a big factor in the decision process, its role is probably of greater significance than survey respondents admit. Over half the visitors to Montana indicated being influenced by the Web site. One-third of the visitors indicated the travel information they received lengthened their stay in Montana. Nonetheless, to be quite conservative in calculating economic impact, only the 10% of actual visitors that had *not decided on a destination* before visiting the site were included in the calculation.

Travel Montana's strategy includes promoting the site in all advertising and marketing material, which lists the Web address and subsequently directs people to the site. As such, total marketing expenses are included in the calculation to determine the return on investment. The table below summarizes the various elements of the calculation by including the number of unique visitors to [visitmt.com](http://visitmt.com) (January through December 2001), visitor expenditures, and campaign expenses. This computes total, *influenced* spending in the State (economic impact).

### Overnight Visitor Impact

ROI Calculation	2001 Total Campaign
Total Unique Visitors	374,156
x Overnight Conversion Rate	49%
Total Making Overnight Visit	183,336
x Influenced to Visit Montana	10%
Impacted Trips	18,334
x Average Length of Trip	7 days
x Average Overnight Expenditures	\$305
<b>Overall Impact</b>	<b>\$39,143,090</b>
<b>Total Campaign Costs</b>	<b>\$1,412,000</b>
<b>ROI</b>	<b>\$28</b>

In reviewing Montana's Internet campaign, total expenditures for 2001 were \$1,412,000, which includes the total for magazine (\$611,000), television (\$521,000) and Web (\$280,000) advertising. When all these expenditures are included in the calculation, the results indicate that for each \$1 spent on marketing \$27.72 was returned to the State via visitor spending. Again, the visitor spending number only reflects the 10% that were *influenced* to travel, thus generating a conservative measure of economic impact.

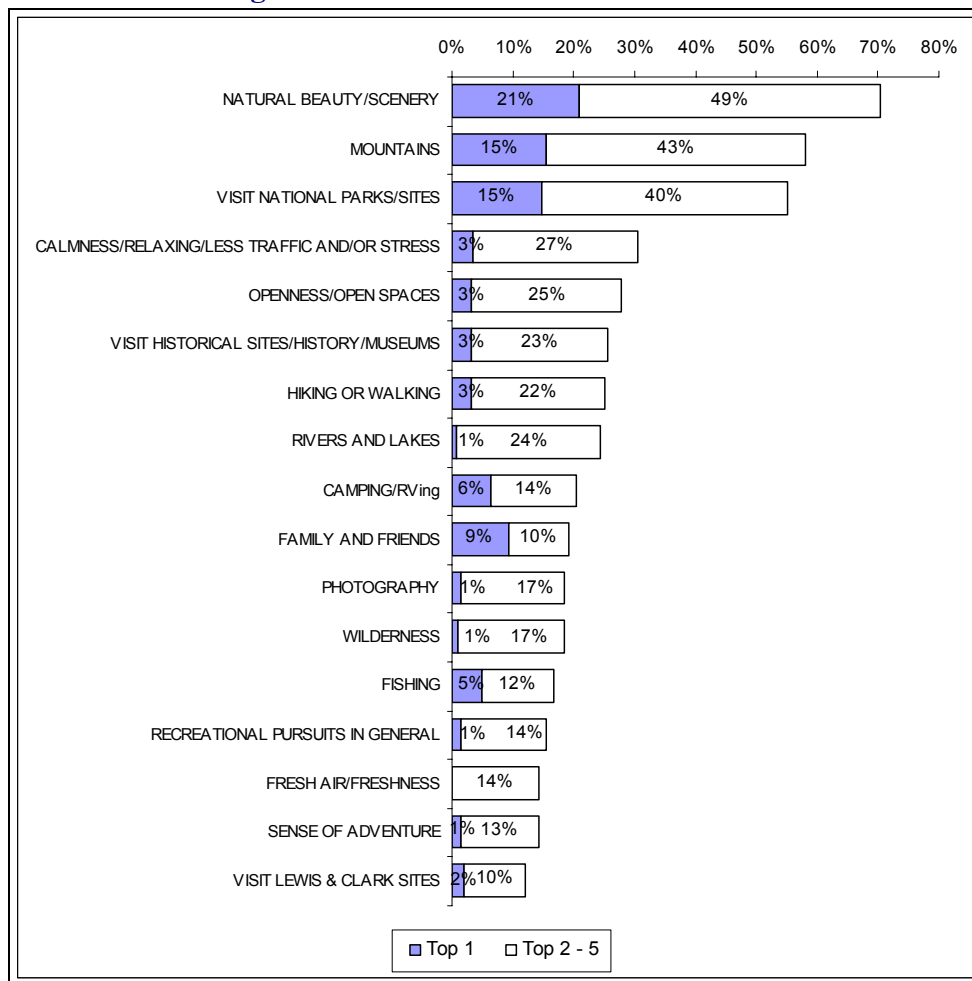
In reality, other people were influenced to increase the duration of their trips. As such, additional economic impact can be attributed to this campaign. Additionally, these direct tourist expenditures generated secondary or "indirect impact" on the economy. Consequently, the total impact of the State's efforts was significantly greater.

## MONTANA VACATION IMAGES

In addition to addressing conversion, this study explored the imagery that Web users have of Montana. This topic was not addressed in great depth; the goal was to determine how different groups of people view the State and which of their images might *work together*. Web site respondents were shown a list of twenty-four activities or phrases that might come to mind when describing a Montana vacation. They were asked to rank the top five that came to mind when they thought of vacationing in Montana.

Predictably, the majority associated Montana vacations with natural beauty, mountains, and national parks. These three attractions were usually the first things thought of about Montana. At least half the site visitors listed these three things in their top five associations.

### Thoughts Associated with a Montana Vacation



Base = 701 Web Site Visitors

While intriguing, this information does not necessarily shed new light on the manner in which Montana should promote or position itself. Of course, one challenge is that different people view the State differently – in part driven by their interests. Using a statistical process known as Cluster Analysis, respondents were divided into five groups by their ratings of these twenty-four activities and how each reminded them of Montana.

This exercise uncovers some differing views of the State and highlights the significance and impact of these images. Some groups are more likely to “convert,” suggesting that their images might have greater influence on travel. At least one group that converted poorly is quite large. This may provide a good target for the State. These groupings may suggest ways to package activities and information on the site so that they conform to the imagery and views of visitors.

#### **History Lovers – 29% Web site visitors**

The largest cluster of Web-users strongly associates Montana with national parks and wilderness, and with historical sites and Lewis & Clark. This group thinks of the history offered by the State. Perhaps an underlying romance with history motivates them when selecting destinations. This cluster tends to be a bit older and male and its members take longer trips to Montana. They are more likely to be married and less likely to have children. They are probably older empty nesters. This group also reports the greatest number of past visits to the State, perhaps discovering the historical side of the State through repeat visitation.

- National parks
- Openness/Open spaces
- Visiting Lewis & Clark Sites
- Wilderness
- Visiting historical sites

#### **Outdoorsmen – 22% Web site visitors**

The second largest group enjoys the mountains of Montana including such sports as skiing/snowboarding and snowmobiling. They also link Montana with hunting. This is probably an active group and it seems to have links within the State since family and friends represent strong imagery for these folks. This group reports a few past trips to the State and is demographically average except for above average levels of education.

- Family and friends
- Skiing/Snowboarding
- Hunting
- Mountains
- Snowmobiling

### **Stress-busters – 21% Web site visitors**

This group differentiates itself through its imagery of Montana related to natural beauty, fresh air, and relaxation. While not necessarily passive relaxation, since this imagery also includes a sense of adventure, they think of Montana as a place to escape from the hustle and bustle of life. This group is most likely to be married and female. They are more likely to travel with children and they spend the most time in the State.

- Sense of adventure
- Fresh air/Freshness
- Natural beauty/Scenery
- Recreational pursuits
- Calmness/Relaxing/Less traffic/Less stress

### **Adventurers – 16% Web site visitors**

The key imagery with this group is Montana outdoors and water/water-based activities. Of interest, this group is the one most likely to associate gambling with Montana, although this association is not especially strong. There are no distinguishing demographic characteristics among this group and their trips to the State reflect the average. They do report a lower level of past visitation to Montana.

- Camping/RVing
- Fishing
- Rivers and Lakes
- Water-based Activities
- Gambling

### **Naturalists – 12% Web site visitors**

The last group prefers outdoor-oriented activities - hiking, biking, and walking. They also imagine the State as a place for special events and photography. This group is the least likely to be married and more likely to be male. They spend the least money per day in Montana and report taking few past trips to the State.

- Hiking/Walking
- Special Events
- Photography
- Biking

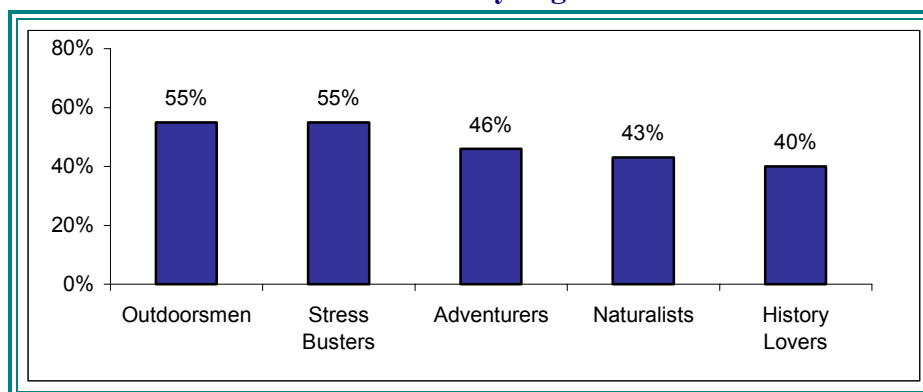
One way to review the potential value of each group is to consider its average daily expenditures in Montana. History Lovers spent the most - over \$100 more per day than Naturalists. Outdoorsmen and Adventurers also spent more money per day, thus representing valuable visitors.

#### Average Daily Expenditures by Group

	<b>Adventurers</b> (52)	<b>History Lovers</b> (81)	<b>Outdoorsmen</b> (84)	<b>Stress-Busters</b> (83)	<b>Naturalists</b> (36)
Lodging	\$97.65	\$68.74	\$84.14	\$84.83	\$72.50
Meals/Food	\$58.13	\$74.00	\$57.96	\$63.55	\$45.97
Admissions	\$12.65	\$13.15	\$11.06	\$16.00	\$12.44
Entertainment	\$12.60	\$20.41	\$36.85	\$20.18	\$9.30
Shopping	\$50.73	\$48.11	\$52.33	\$44.82	\$34.42
Transportation	\$43.13	\$39.17	\$44.14	\$38.76	\$32.28
Misc. Others	\$27.79	\$60.60	\$22.36	\$24.70	\$15.00
<b>Total</b>	<b>\$302.68</b>	<b>\$324.18</b>	<b>\$308.84</b>	<b>\$292.84</b>	<b>\$221.91</b>

Montana needs not only to attract the groups that spend the most but those most likely to visit the State. Among all five groups, the conversion rate among History Lovers was the lowest. This suggests that while they have visited Montana in the past, they are not as likely to return. Perhaps the State needs to give this group new reason to return. On the other hand, Outdoorsmen, who spent the second highest per day, also indicate the highest conversion rate. Naturalists combine a low conversion rate with low spending levels, suggesting they may be weak targets for future efforts.

#### Conversion by Segment

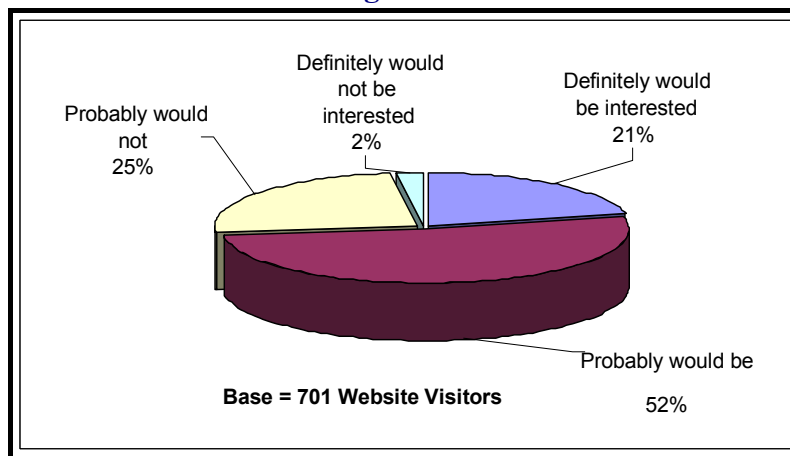


## LEWIS & CLARK HISTORIC SITES

One image tested among Web site visitors was the Lewis & Clark sites. In addition, respondents were asked to rate their interest in a vacation that followed the Lewis & Clark Trail through Montana. Overall, nearly three-quarters of the respondents (73%) indicated some level of interest in following the trail, but only 21% indicated strong probability.

As seen, the Lewis & Clark sites are currently not a “top of mind” activity among respondents’ associations with Montana. Only 12% of the Web site visitors rated Lewis & Clark sites in their top five associations with a Montana vacation. Consequently, there is potential to promote the Lewis & Clark trail, but without promotion it may be overlooked by potential visitors. The interest is evident, but currently the Trail is not strongly linked with Montana. Given that most people indicate moderate interest, it probably makes sense to “package” the Trail with other Montana attractions to prompt visitors to add it to their trips to the State.

**Interest in Following the Lewis & Clark Trail**



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## CONCLUSIONS & RECOMMENDATIONS

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- **Users of the Travel Montana Web site are relatively sophisticated Internet users. They are likely to have Web access at both home and work.** They begin several months in advance of a trip to explore destinations on the Web and they visit favorite travel sites regularly. Given their frequent use of the Web for travel planning they are probably using the site for specific purposes ranging from researching destinations to making specific trip arrangements.
- **Internet users normally visit the same Web site multiple times to gather travel information.** Overall, nearly three-quarters of the [visitmt.com](http://visitmt.com) Web site users indicated checking a travel Web site monthly or more often. As such, it is important to ensure that Web site content is up-to-date and changed regularly. Additionally, site navigation needs to make it easy to access desired elements of the site, knowing that people use different features at varying points in the travel decision/planning process.
- **The [visitmt.com](http://visitmt.com) Web site is influencing people to visit Montana.** About 10% of the people were directly influenced to visit and almost half claimed that the site influenced their decision to some degree. The Web site and follow-up materials also helped convince people to spend more time in Montana. Given that people are accessing the site during the decision process, the site needs to promote the benefits of Montana and sell the destination in addition to providing the information necessary to plan a visit to the State.
- **The [visitmt.com](http://visitmt.com) Web site is accessed by a considerable number of people. This research indicates that nearly half the Web site users selected Montana as their primary vacation destination last year.** While many had decided to visit before using the site, when only influenced travel is considered, the Web site helped generate over 18,000 trips to the State and, conservatively speaking, these visitors spent over \$39 million in Montana. Taking into account all advertising spending (Web site, television, and magazines) the overall return on investment was approximately \$28.
- **The Web site is performing well, as 99% of users indicated that the information was useful.** Even so, about half the people requested additional information by phone or mail, highlighting the fact that, to date, the Internet is not a substitute for print materials. People, not ready for a paperless world, often want something to hold in their hands, not just information printed off a computer. They want professional looking, color brochures that they can share with their families and travel companions.

- **Travel Montana needs an integrated information strategy that provides a strong Web presence as well as the types of print material consumers want.** The goal should be to provide the right information in the appropriate format and maximize the effectiveness of each medium.
- **The majority of people used a search engine to find the [visitmt.com](http://visitmt.com) Web site, which is typical for destination sites.** This means that Travel Montana should regularly check to ensure that the site is among the top matches for the major search engines and that various links on other sites are provided. In addition, advertising and print materials should continue to promote the Web site address, so that people know of its availability. Advertising will help establish familiarity with the site and interest in the destination and, ultimately, it will direct consumers to the Web site.
- **Various specifics about Montana visits should be considered.** First, an above average number of people travel to the State by air. Consequently, airfares can be a potential barrier to travel. The Web site might feature package deals, airline discounts, or link visitors to good airfare sources.
- **Overall satisfaction with the Montana travel experience is extremely high, as 93% of the respondents claimed to be “very satisfied.”** Still, only about half indicated likelihood to return over the next two years. Approximately 27% of the Web visitors were repeat users, suggesting that Montana will be challenged to generate higher levels of repeat visitation.
- **The average trip to Montana was quite long, at seven nights, and expenditures were over \$300 per day.** A trip to Montana is a major undertaking. As such, people do not return as frequently as they might to other vacation destinations. Information should help people make the most of each trip and plan extra days in the State. Additionally, the Web site and travel materials should highlight new features and attractions that will give people new reason to visit.
- **While about half the Web site visitors indicated a preference for traveling to Montana during the summer, the other half prefer other seasons.** Consequently, the Web site needs to present pages that promote each season. Most of these respondents plan their travel vacations two or more months in advance. This suggests that the planning cycle for people using the Internet is similar to that of those who inquire via other methods.

- ▶ **When deciding on the manner in which information is presented on the Web and in print materials, it helps to know the themes that emerge when people think about Montana.** Essentially, four themes (and five clusters of images) emerged, which included history, outdoors/nature, getting away from it all, and adventure. These themes can provide ways to package attractions and events as well as generate ideas about the kinds of things that should be packaged.
- **The Lewis & Clark sites seem to offer potential, as a fair degree of interest was indicated in these attractions.** However, top-of-mind awareness of these sites, as linked to Montana, was relatively low. As such, additional promotion needs to be launched to capitalize on this attraction.

## APPENDIX

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## Questionnaire

### Travel Montana Internet Conversion Study Questionnaire Approved: November 6, 2001

We are conducting a brief survey on travel behavior and attitudes of visitors to the Montana [visitmt.com](http://visitmt.com) Web site. We would appreciate it if you could assist us in this research effort by completing this survey. If you complete the brief survey, we will enter you into a drawing to receive \$250 or a framed poster by renowned Montana artist Monte Dolack.

Please be assured that no sales call will ever result from your participation and all your answers will be kept strictly confidential. The survey should take about 10 minutes to complete.

Q1. First, our records indicate that you accessed information on the Travel Montana Web site ([visitmt.com](http://visitmt.com)) within the past 6 months. Did you visit the Web site because you were considering traveling to Montana?

- 1...Yes
- 2...No
- 3...Did not access the Web site → **THANK & TERMINATE**

Q2. Why did you initially go the [visitmt.com](http://visitmt.com) Web site? (**ACCEPT MULTIPLES**)

- 1...To do research and find out more about the State
- 2...To help plan for a trip
- 3...To find a hotel/motel
- 4...To make hotel reservations
- 5...To find directions to specific attractions
- 6...To find attractions to visit
- 7...To decide whether to visit Montana
- 8...To find a calendar of events
- 9...Other (SPECIFY) \_\_\_\_\_

Q3. How did you become aware of the [visitmt.com](http://visitmt.com) Web site? (**ACCEPT MULTIPLES**)

- 1...Through an Internet search engine (i.e. Yahoo, Excite, Google, etc.)
- 2...Through a Web link located on another Web page
- 3...Television ad
- 4...Magazine ad
- 5...Internet ad
- 6...A friend or relative
- 7...Newspaper and magazine articles
- 8...Other (SPECIFY) \_\_\_\_\_
- 9...Don't Remember

Q4. Had you been to the [visitmt.com](http://visitmt.com) Web site before?

- 1...Yes
- 2...No → **SKIP TO Q6**

- Q5. How often over the past 12 months have you visited the [visitmt.com](http://visitmt.com) Web site?  
Would you say...?
- 1...Once
  - 2...2 to 3 times
  - 3...4 to 6 times
  - 4...7 to 10 times
  - 5...More than 10 times
  - 6...Don't remember
- Q6. Were you able to locate all or most of the information you needed by viewing the various sections of the [visitmt.com](http://visitmt.com) Web site?
- 1...Yes
  - 2...No
- Q7. How useful was the information you obtained at the [visitmt.com](http://visitmt.com) Web site? Would you say...?
- 1...Very useful
  - 2...Somewhat useful
  - 3...Not very, or
  - 4...Not at all useful
- Q8. Did you request additional information about traveling to Montana, either by mail or by calling an 800 telephone number, or did you just browse through the [visitmt.com](http://visitmt.com) Web site?
- 1...Requested additional information by telephone
  - 2...Requested additional information by mail
  - 3...Just browsed the Web site → **SKIP TO Q. 10**
  - 4...Don't remember → **SKIP TO Q. 10**
- Q9. If you requested additional information about Montana by mail or phone, did you receive the information you requested?
- 1...Yes
  - 2...No
  - 3...Don't remember
  - 4...Did not request additional information
- Q10 During the past year, did you take any trips of 200 miles or more that took you outside of your home State?
- 1...Yes
  - 2...No
- Q11 Did you travel to or through Montana?
- 1...Yes
  - 2...No → **SKIP TO Q. 27.**
- Q12. Was Montana your PRIMARY vacation destination?
- 1...Yes
  - 2...No → **SKIP TO Q. 27.**

Q13. Did you decide to travel to Montana before or after you visited the [visitmt.com](http://visitmt.com) Web site?

- 1...Before
- 2...After
- 3...Don't remember

**ASK Q 14 ONLY IF Q. 8 = "1" OR "2." OTHERWISE SKIP TO Q. 15**

Q14. Did you decide to travel to Montana before or after you received any additional travel information you may have requested?

- 1...Before
- 2...After
- 3...Don't remember
- 4...Did not request additional information

Q15. How much or little influence did the information you saw on the [visitmt.com](http://visitmt.com) Web site have on your decision to travel to Montana? Would you say it had...?

- 1...A great deal of influence
- 2...Some influence
- 3...Very little, or
- 4...No influence at all

**ASK Q. 16 ONLY IF Q. 8 = "1" OR "2." OTHERWISE SKIP TO Q. 17**

Q16. How much or little influence did the information you received in the mail or by telephone have on your decision to travel to Montana? Would you say it had...?

- 1...A great deal of influence
- 2...Some influence
- 3...Very little, or
- 4...No influence at all

Q17. Did the travel information influence the planning of the length of your stay for your travel to Montana?

- 1...Yes – Lengthened stay in Montana
- 2...Yes – Shortened stay in Montana
- 3...No – No effect on length of stay

Q18. The next few questions are about your MOST RECENT trip to Montana. What was the PRIMARY purpose of this trip?

- 1...Recreation and activities
- 2...Sightseeing
- 3...Relaxation and escape
- 4...Visit historical sites/history museum
- 5...Visit friend or relative/ personal reasons
- 6...Business, conference, or convention
- 7...Combination of business and pleasure
- 8...Just passing through
- 9...Other (SPECIFY) \_\_\_\_\_
- 10...Don't remember

Q19. What was the primary form of transportation you used to visit Montana?

- 1...Plane
- 2...Car, van or RV
- 3...Bus
- 4...Train
- 5...Other (SPECIFY) \_\_\_\_\_

Q20. How many adults 18 years of age or older were in your immediate traveling party on your most recent trip? ENTER NUMBER: \_\_\_\_\_

Q21. How many children 17 years or younger were in your immediate traveling party on your most recent trip to Montana? ENTER NUMBER: \_\_\_\_\_

Q22. How many nights (OVERNIGHT) did you stay in Montana? ENTER NUMBER: \_\_\_\_

Q23. What were your primary accommodations used while visiting Montana on your most recent trip?

- 1...Hotel or Motel
- 2...Bed & Breakfast
- 3...Resort
- 4...Rental condominium or home
- 5...Guest ranch
- 6...Campground
- 7...RV park
- 8...Home of friends or relatives
- 9...Your own vacation or second home
- 10..Other (SPECIFY) \_\_\_\_\_

Q24 While you were in Montana, on average, about how much did you and your immediate traveling party spend per day in Montana, on each of the following?  
ENTER AMOUNT FOR EACH CATEGORY

	<u><b>Avg. spent per Day</b></u>
Lodging	_____
Meals/food/groceries	_____
Admission to parks/attractions	_____
Entertainment	_____
Shopping	_____
Transportation (in Montana only)	_____
Miscellaneous other things	_____

Q 25 Overall, how satisfied were you with your trip to Montana? Would you say you were...?

- 1...Very satisfied
- 2...Somewhat satisfied
- 3...Neither satisfied nor dissatisfied
- 4...Somewhat dissatisfied, or
- 5...Very dissatisfied

Q26. How likely would you be to take another trip to Montana? Would you say you would be...?

- 1...Very likely → **SKIP TO Q. 28.**
- 2...Somewhat likely → **SKIP TO Q. 28.**
- 3...Neither likely nor unlikely → **SKIP TO Q. 28.**
- 4...Somewhat unlikely, or → **SKIP TO Q. 28.**
- 5...Very unlikely → **SKIP TO Q. 28.**

Q27. Why did you choose not to visit Montana during the past year? Review all of the options below, then select up to five of the most appropriate reasons.

- 1...Airline costs too expensive
- 2...Could not afford a trip/ other financial reasons
- 3...Did not receive information about Montana
- 4...No time for a trip
- 5...Personal or family illness/ problem
- 6...Montana not attractive or interesting
- 7...Visited another location instead of Montana
- 8...Other reason (Specify) \_\_\_\_\_

Q28. In the next two years would you say you...?

- 1...Definitely will visit Montana
- 2...Probably will
- 3...Probably will not, or
- 4...Definitely will not visit Montana

Q29. In which season would you most likely visit Montana?

- 1...Winter
- 2...Spring
- 3...Summer
- 4...Fall

Q30. In the past five years, how many times have you been to Montana?

ENTER NUMBER OF TIMES \_\_\_\_\_

Q 31. When you think of a Montana vacation, what thoughts come to mind? REVIEW ALL ANSWERS BELOW, THEN RANK THE TOP FIVE ANSWERS WITH "1" BEING THE HIGHEST, "2" BEING THE NEXT HIGHEST, ETC. THROUGH THE TOP FIVE.

- 1...CAMPING/RVing
- 2...HIKING OR WALKING
- 3...FISHING
- 4...HUNTING
- 5...MOUNTAINS
- 6...RIVERS AND LAKES
- 7...WATER-BASED ACTIVITIES
- 8...SPECIAL EVENTS
- 9...BIKING
- 10..PHOTOGRAPHY
- 11..SNOWMOBILING
- 12..FAMILY AND FRIENDS
- 13..GAMBLING
- 14..RECREATIONAL PURSUITS IN GENERAL
- 15..VISIT HISTORICAL SITES/HISTORY/MUSEUMS
- 16..NATURAL BEAUTY/SCENERY
- 17..VISIT NATIONAL PARKS/SITES
- 18..OPENNESS/OPEN SPACES
- 19..WILDERNESS
- 20..CALMNESS/RELAXING/LESS TRAFFIC AND/OR STRESS
- 21..FRESH AIR/FRESHNESS
- 22..SENSE OF ADVENTURE
- 23..SKIING OR SNOWBOARDING
- 24..VISIT LEWIS & CLARK SITES
- 25..OTHER (SPECIFY) \_\_\_\_\_

Q32. Montana has the largest number of identified Lewis & Clark historic sites in the nation. How interested would you be in a vacation that followed the Lewis & Clark Trail? Would you say you...?

- 1...Definitely would be interested
- 2...Probably would be,
- 3...Probably would not, or
- 4...Definitely would not be interested

Q33. When you are choosing a site for a vacation or leisure trip, are you more likely to...?

- 1...Visit places you have visited before
- 2...Select new place
- 3...Select a mix of familiar and new places

Q34. Do you have Internet access at ...?

- 1...Home
- 2...Work
- 3...Both home and work

Q35. When using the Internet for making travel plans, how far in advance do you generally start searching the net for information? Would you say you start searching...?

- 1...Less than 2 weeks before you travel
- 2...2 – 4 weeks before you travel
- 3...1 – 2 months before you travel
- 4...More than 2 but less than 4 months before you travel
- 5...More than 4 months before you travel

Q36. When searching the Internet for travel information, about how often do you return to the same Web site to check for updated information? Would you say you...?

- 1...Return daily
- 2...Return weekly
- 3...Return monthly
- 4...Less often than monthly
- 5...Never return

Q37. When searching the Internet, from what bandwidth are you connecting?

- 1...56K/dial-up
- 2...T1/LAN
- 3...DSL
- 4...Cable modem
- 5...Other (SPECIFY) \_\_\_\_\_
- 6...Don't know

**These last few questions are for grouping your responses with others similar to you.**

Q38. What is your marital status?

- 1...Married
- 2...Divorced
- 3...Widowed
- 4...Single/never married

Q39. Are you female or male?

- 1...Female
- 2...Male

Q40. Including yourself, how many people are currently living in your household?

ENTER NUMBER: \_\_\_\_\_

Q41. How many children under the age of 18 do you have living at home?

ENTER NUMBER: \_\_\_\_\_

Q42. Which of the following categories best represents the last grade of school you completed?

- 1...High school or less
- 2...Some college/technical school
- 3...College graduate
- 4...Post graduate degree

Q43. Which of the following categories best represents the total annual income for your household before taxes?

- 1...Under \$20,000
- 2...\$20,000 to \$39,999
- 3...\$40,000 to \$59,999
- 4...\$60,000 to \$79,999
- 5...\$80,000 to \$99,999
- 6...\$100,000 to \$120,000
- 7...More than \$120,000

Q44. What is your age? ENTER AGE: \_\_\_\_\_

**Please provide the following information to be entered in a drawing for \$250 or a framed poster by renowned Montana artist Monte Dolack.**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_

ZIP CODE: \_\_\_\_\_

PHONE NUMBER (Including Area Code): \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

**Thank you very much for taking the time to complete this survey.**

## Initial (Pop-up) Survey Results

Results from Pop-up Survey				Actual Conversion
<b>Q1 Please tell us where you saw our Internet address?(Accept multiples)</b>				<b>Survey Results</b>
	Frequency	Percent		
Magazine advertisement	296	9%		7%
Television advertisement	93	3%		2%
Newspaper	58	2%		3%
From another Internet site	928	27%		14%
Internet Search Engine	1427	42%		63%
E-mail message	124	4%		
Friend	189	6%		4%
Misc. Others	287	8%		
Don't Know	0			7%
	3402			
<b>Q2 Are you planning a trip to Montana....</b>				
This spring	200	6%		12%
This summer	1656	49%		50%
This fall	403	12%		19%
This winter	38	1%		6%
Sometime in the future	867	25%		
Not planning a trip to Montana currently	238	7%		
Don't Know				13%
Total	3402			
<b>Q3 What best describes the travel group you plan to be with on the vacation?</b>				
Self	350	10.3%		N/A
Couple	1348	39.6%		N/A
Family with kids	915	26.9%		N/A
Friends	264	7.8%		N/A
Family and friends	297	8.7%		N/A
Business associates	37	1.1%		N/A
Organized group or club	60	1.8%		N/A
Other (specify)	131	3.9%		N/A
Total	3402			
<b>Q4 Are you aware of the upcoming Lewis &amp; Clark Bicentennial Commemoration?</b>				
Yes	575	16.9%		N/A
No	2827	83.1%		N/A

## Respondents by Place of Residence

### RESPONDENTS BY STATE

	Visitor	Non-visitor	Total
CA	8.1%	3.7%	6.4%
WA	8.6%	2.6%	6.3%
MN	6.3%	3.7%	5.3%
TX	3.5%	8.1%	5.3%
FL	3.3%	5.5%	4.1%
IL	4.2%	3.3%	3.9%
PA	2.8%	5.2%	3.7%
WI	3.7%	3.0%	3.4%
MT	4.7%	1.1%	3.3%
GA	3.3%	3.0%	3.1%
OH	2.8%	3.0%	2.9%
OR	3.7%	1.5%	2.9%
MO	1.6%	3.3%	2.3%
MI	1.4%	3.0%	2.0%
UT	2.1%	1.8%	2.0%
VA	1.9%	2.2%	2.0%
CO	2.1%	1.5%	1.9%
AZ	1.2%	2.6%	1.7%
MA	2.1%	0.7%	1.6%
MD	1.4%	1.5%	1.4%
NC	1.9%	0.7%	1.4%
NY	0.7%	2.6%	1.4%
SC	0.9%	2.2%	1.4%
LA	0.7%	2.2%	1.3%
IN	0.5%	2.2%	1.1%
ID	1.2%	0.7%	1.0%
KS	0.9%	1.1%	1.0%
TN	1.4%	0.4%	1.0%
NV	0.9%	0.7%	0.9%
IA	0.9%	0.4%	0.7%
ND	0.7%	0.7%	0.7%
NE	0.2%	1.5%	0.7%
NM	0.5%	1.1%	0.7%
AL	0.5%	0.7%	0.6%
KY	0.2%	1.1%	0.6%
NJ	0.7%	0.4%	0.6%
OK	0.5%	0.7%	0.6%
WV	0.2%	0.7%	0.4%
WY	0.7%	0.0%	0.4%
AK	0.5%	0.0%	0.3%
AR	0.0%	0.7%	0.3%
CT	0.2%	0.4%	0.3%
ME	0.0%	0.7%	0.3%
MS	0.0%	0.7%	0.3%
NH	0.0%	0.7%	0.3%
VT	0.2%	0.4%	0.3%
SD	0.2%	0.0%	0.1%
<b>TOTAL U.S.</b>	<b>84.0%</b>	<b>84.1%</b>	<b>84.0%</b>

## OUT-OF-COUNTRY RESPONDENTS

	Visitor	Non-visitor	Total
ALBERTA	2.8%	1.5%	2.3%
BRITISH COLUMBIA	1.9%	0.0%	1.1%
MANITOBA	0.0%	0.7%	0.3%
NORTHWEST TERRITORY	0.2%	0.4%	0.3%
ONTARIO	0.5%	1.5%	0.9%
<b>TOTAL CANADA</b>	<b>5.3%</b>	<b>4.1%</b>	<b>4.9%</b>
AE (U.S. Army Overseas Post Office)	0.0%	0.7%	0.3%
DENMARK	0.2%	0.0%	0.1%
FRANCE	0.0%	0.4%	0.1%
GERMANY	0.7%	0.7%	0.7%
IRELAND	0.0%	1.1%	0.4%
ITALY	0.5%	0.4%	0.4%
JAPAN	0.2%	0.0%	0.1%
NETHERLANDS	0.0%	0.4%	0.1%
NORWAY	0.5%	0.0%	0.3%
POLAND	0.0%	0.7%	0.3%
SCOTLAND	0.5%	0.0%	0.3%
SOUTH WALES	0.2%	0.0%	0.1%
SURREY	0.2%	0.0%	0.1%
SWEDEN	0.2%	0.7%	0.4%
TYNE	0.0%	0.4%	0.1%
UK	0.5%	0.7%	0.6%
VIRGIN ISLANDS	0.2%	0.0%	0.1%
<b>TOTAL OTHER</b>	<b>4.0%</b>	<b>6.3%</b>	<b>4.9%</b>
Blank	6.7%	5.5%	6.3%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>